

Performance Work Statement
Office of Small and Disadvantaged Business Utilization (OSDBU)
Direct Access Program
OSDBU Direct Access Program Support Services

Introduction. VA OSDBU is responsible for the planning and execution of programs, which impact the access of VOSB/SB firms to procurement opportunities. Specific categories of support include but are not limited to; research and analysis, information management, outreach activities, web site management, reports, program management, Forecast of Contracting Opportunities (FCO) and market research. VA OSDBU serves as advisor to the Secretary of VA on small business related matters in support of VA's mission: "To care for him who shall have borne the battle, and for his widow, and his orphan" by serving and honoring the men and women who are America's Veterans. To that end, the office spearheads initiatives to maximize business opportunities for small businesses by synchronizing critical resources through extensive marketing, counseling, and training. VA OSDBU also provides policy guidance, direction, and education to the VA acquisition community to assist in the execution of the VA Small Business Program. This order is intended to provide subject matter expertise, technical, analytical and management resources in support of the Direct Access Program (DAP).

Scope or Purpose. The scope includes professional services, including extensive site research, analysis and recommendations to satisfy DAP requirements for the oversight of direct access events to include the National Veterans Small Business Engagement (NVSBE) and to develop reports based on feedback documents, financial, and other reports for multiple events to include one national event (NVSBE).

- 1. Period of Performance (PoP).** The (PoP) for the base period is 12 months with four (4) 12-month option periods.

Period	Dates
Base	May 28, 2016 – May 27, 2017
Option One	May 28, 2017 – May 27, 2018
Option Two	May 28, 2018 – May 27, 2019
Option Three	May 28, 2019 – May 27, 2020
Option Four	May 28, 2020 – May 27, 2021

2. Place of Performance.

- a. The primary place of performance shall be at 801 I Street NW, Washington, DC 20410; 90 K St. NE, Washington, DC 20002 with the exception of those designated to work at the following locations: the contractor's locations; other designated Government sites within the Washington, DC metropolitan area; event sites across the United States during the event execution period and other approved alternate worksites. All contractor's facilities and employees shall be located within the National Capital Region fifty (50) mile radius of designated Government facility for routine work weeks

- b. All contractors must be available for a monthly on-site training day and regular duty at the government facilities listed above as required by the Federal team lead
 - c. The core work hours at the Government locations are (7:00 am – 5:00 pm ET) Monday through Friday except Federal holidays. Coordination and prior approval by the Government is required for on-site contractor personnel to work outside of the core work hours.
- 3. Travel.** Travel costs will be included in the order award as a separate, cost-reimbursable, “not to exceed” contract line item. Travel will be reimbursed in accordance with Federal Travel Regulations and approved in advance by the Contract Officer Representative (COR). Contractor shall provide receipts for all travel expenses. Travel will not be allowed when virtual means of communication will suffice. Local travel within 50 miles is not reimbursable. The cost of local travel, meal, and/or incidental expenses cost will not be reimbursed for Contractor performance. Justification may be requested from the federal program manager for required contractor travel.

4. Task Statement.

- a. Cost Analyst Support
 - i. Performs cost analysis with responsibility for analyzing a variety of proposed program/project activities, involving a wide range of factors affecting cost, with pertinent historical data generally available. Tasks may include developing Program Life Cycle Cost Estimates, cost models and estimating relationships; assisting in the conduct of cost-benefit and business case analyses; and preparing and presenting PowerPoint presentations, process summary reports, meeting minutes/notes, and other program management documentation.
 - 1. Serves as a Cost Analyst responsible for performing the cost estimating and cost analysis functions for the Direct Access Program
 - 2. Perform program cost variance analysis to reflect any significant variance between the cost estimate in the original plan, current approved program, and actual costs to include analysis of capability increases/decreases, contractor cost increases/decreases, items add/deleted, other cost increases/decreases. Each of the above categories of cost variance requires, in addition to the statistical data of cost and quantity, a detailed narrative explanation of reasons for any variances that are noted.
 - 3. Reconciles automated ledgers for assigned accounts to assure documentation is correct and allotted funds are not exceeded.
 - 4. Monitors and tracks obligations and costs. Assures obligations and costs occur on a timely basis in accordance with the annual phased execution plan and regulatory guidance/ limitations.

5. Prepares data summaries for inclusion in routine and special reports on budget execution. Tabulates cost data on individual projects.
6. Verifies obligations, expenses, and unobligated funds that appear on cost reports and assures that necessary corrections are made in a timely fashion.
7. Researches, analyzes and prepares documents in preparation for project internal process reviews
8. Assist in the management of the DAP Internal Operating Budget (IOB) budget requirements. Develops a time-line for preparation of the IOB and oversees accomplishment of all tasks assuring a timely budget completion.
9. Prepares briefing charts and narratives for presentation for the Director, Direct Access Program.
10. Assists in the formulation and development of DAP out-year rates and prices.
11. Analyzes mission workload, projects the quantity of work that will be accomplished, and associated expenditures that will be incurred.
12. Prepares charts and other materials to brief management on out-year rates and components of the rates.
13. Assists in the preparation of written budget and other presentation narratives
14. Assists in the formulation of direct access events funding requirements and justification packages.
15. Develop a thorough knowledge of program and present a well prepared justification that assures resources are available for operation and mission accomplishment.
16. Review site selection recommendations of event management contractor and oversees site selection recommendation memorandum to COSVA/SECVA
17. Integrator between event and event management software contractors and identifies gaps, risks and user requirements
18. Responsible for the development of the integrated logistics support plans
19. Prepares reports and queries to analyze and assess the status of the event as necessary
20. Knowledge and skill in applying analytical and evaluative techniques to the operations and management of the conferences program with the objective of optimizing its efficiency and effectiveness
21. Recommend revision to the VA conference forms for all DAP events. Exercises timely and accurate submittal and tracking of VA Conference forms as required by VA guidelines and law
22. Prepares data summaries for inclusion in a variety of DAP reports
- 23.

ii. Deliverables:

1. VA Conference Package
2. Event Budget Reports
3. DAP Cost projection reports
4. DAP Cost execution reports
5. VA Conference Event Package
6. Final After Action Report to Executive Director, OSDDBU and SECVA
7. SECVA Waiver
8. Risk analysis assessment
9. Integrated Logistics Support Plan
10. Gap Analysis Report to include additional user requirements

b. Data Analyst Support

- i. Performs tasks which may include obtaining data through advanced computerized models; extrapolating data patterns through advanced algorithms; developing simple graphs and charts to explain how the mathematical information will influence the specific project or business; and presenting to managers how to best alter their business models to generate profitable future trends.
 1. Track metrics and trends, and analysis of activities surrounding the input, processing, and output of data from the various computer programs or systems.
 2. Recommends programs and techniques to improve data quality and business practices.
 3. Conducts statistical analyses and studies concerning the trends and impact of changes in direct access events.
 4. Prepares reports based on studies and analysis, provided metrics and other information for the Direct Access Program. The data to be analyzed may be detailed or aggregate but are related to financial expenditures, utilization patterns, or demographic considerations.
 5. Participates in workgroups or committees with other VA staff and stakeholders, to develop methods for innovative approaches to determining and assuring the reliability and validity of productivity and workload data.
 6. Analyzes, interprets, and summarizes a variety of work processes performed by direct access personnel in functionally different, but interrelated operations.
 7. Develops studies, summaries, and analyses from various source data collection systems. Coordinates input from feedback and other reports to develop or support plans designed to solve data problems.
 8. Validates data for accuracy and completeness and refines into format for specific responses or summary reports.
 9. Identify and explain disparities between reporting periods in regard to changes, trends or circumstances not readily evident from the data.
 10. Manages and controls various applications and ad hoc reports for data capture and data quality improvement activities relating to a wide range of source data collection and information systems.

11. Recommends methods to assist with improvement of data quality and business practices impacting operations
12. Responsible for maintaining hardcopy and/or electronic copies of reference materials, to include regulatory guidance and SOPs.
13. Utilizes judgment in researching regulations/directives and in determining the relationship between guidelines and organizational efficiency.
14. Continuously monitors issues related to the data integrity function to improve the quality and accuracy of the information retrieval systems data and functionality.
15. Develops presentations for briefings and routine reports. The analyses and recommendations of the Data Analyst are routinely presented to staff and leaders.
16. Review site selection recommendations of event management contractor and oversees site selection recommendation memorandum to COSVA/SECVA
17. Integrator between event and event management software contractors and identifies gaps, risks and user requirements
18. Responsible for the development of the integrated logistics support plans
19. Prepares reports and queries to analyze and assess the status of the event as necessary
20. Knowledge and skill in applying analytical and evaluative techniques to the operations and management of the conferences program with the objective of optimizing its efficiency and effectiveness
21. Recommend revision to the VA conference forms for all DAP events. Exercises timely and accurate submittal and tracking of VA Conference forms as required by VA guidelines and law
22. Prepares data summaries for inclusion in a variety of DAP reports

ii. Deliverables:

1. VA Conference Package
2. DAP event statistical report
3. DAP trend reports
4. DAP metrics reports
5. Site Selection comparison report with recommendations
6. VA Conference Event Package
7. Final After Action Report to Executive Director, OSDBU and SECVA
8. SECVA Waiver
9. Risk analysis assessment
10. Integrated Logistics Support Plan
11. Gap Analysis Report to include additional user requirements

c. Administrative Support

- i. Performs work solely of a clerical, support nature. Tasks may include copying, transcribing, answering phone calls, assembling documents or reports, filing, scheduling meetings/conferences or making calendar arrangements.
1. Processes incoming and outgoing mail, including publications, distribution and records management
 2. Prepares requests for supplies,
 3. Prepares of recurring reports.
 4. Prepares and reviews travel orders, travel vouchers
 5. Makes day-to-day adjustments in administrative assignments to meet changing priorities and procedures, shifting workloads, and personnel absences.
 6. Instructs and assists Government personnel and contractor personnel in administrative procedures, and furnishes reference material, answers questions, and gives special instructions as required.
 7. Prepares, files, and acts as responsible person for all forms, reports, filing, typing, and general administration functions for the DAP team
 8. Prepares all VA Conference packets
 9. Submits approved conference packets to VA Conference system.
 10. Solicit inputs and post daily calendar updates for the Director;
 11. Schedule all required daily meetings and conferences/calls;
 12. Draft Weekly Executive Director VA Reports for federal review and approval;
 13. Develop, reproduce, and format decision briefings and information packages for Director's presentations
 14. Monitor NVSBE Mailbox daily and track responses.
 15. The DAP Director's Schedule: The contractor shall track daily meetings and appointments of the DAP Director in order to facilitate management and efficiency of the Director's time. The contractor shall identify meetings requiring the DAP Director's attention and/or presence and shall be recorded via Microsoft Outlook. The Director's Meeting Schedules shall be provided IAW established OSDDBU policies and directives.
 16. DAP master task list: The contractor shall record activities, deadlines, and status of projects assigned to DAP team members to support information required to meet task due dates
 17. The DAP Director's Presentations: The contractor shall prepare briefings materials used to facilitate awareness of DAP events, planning and status used for informational and decisional purposes. Presentations shall be provided IAW established OSDDBU policies and directives.
 18. Maintains a day-to-day status on projects assigned to the direct access team
 19. Keeps track of personnel taskings to support events
 20. Furnishes background information and in-process reviews (IPR) on assigned events to Director, Direct Access Program

21. Maintains an events database, using MS Outlook Calendar and Microsoft Access, for management, information flow, and historical reference

ii. Deliverables

1. DAP Director's Calendar
2. DAP Director's Presentations
3. DAP Director's Meeting Schedules
4. DAP Mail Distribution
5. DAP Task Monitoring Report
6. Site Selection comparison report with recommendations
7. VA Conference Event Package
8. Final After Action Report to Executive Director, OSDDBU and SECVA
9. SECVA Waiver

5. Delivery Schedule.

Task	Deliverable	Quantity	Delivery Date
4.a	DAP Cost execution reports	Weekly	Every Tuesday; negative response required
4.a	Event Budget Reports	Weekly	Every Tuesday; negative response required
		Annually	NLT 15 calendar days after end of the fiscal year
4.a	DAP Cost projection reports	Weekly	Every Tuesday; Negative response required
4.a	Risk analysis assessment	Every Event	NLT 30 days after event date is selected
4.a	Integrated Logistics Support Plan	Every Event	NLT 30 days

			after event date is selected
4.a	Gap Analysis Report to include additional user requirements	Every Event	NLT 30 days after event date is selected
4.a	Final After Action Report to Executive Director, OSDDBU and SECVA	Annually	NLT 30 Days after NVSBE
4.a	SECVA Waiver	Bi-Annually	NLT 60 days after event site selection results
4.a	VA Conference Package	30,60,90 days before event 15 and 45 days after event	TBD based on event date
4.b	DAP event statistical report	Quarterly	NLT 15 calendar days after the quarter ends
		Annually	NLT 15 calendar days after the FY ends
4.b	DAP trend reports	Quarterly	NLT 15 calendar days after the quarter ends
		Annually	NLT 15 calendar days after the FY ends
4.b	DAP metrics reports	Weekly	Every Tuesday; Negative report required
		Monthly	NLT 5 th working day of the month; Negative report required
		Quarterly	NLT 15 calendar days after the quarter ends
		Annually	NLT 15 calendar days after the FY ends
4.b	VA Conference Package	30,60,90 days before event	TBD based on event date

		15 and 45 days after event	
4.b	Site Selection comparison report with recommendations	Every Event	NLT 30 days after event date is selected
4.b	Risk analysis assessment	Every Event	NLT 30 days after event date is selected
4.b	Integrated Logistics Support Plan	Every Event	NLT 30 days after event date is selected
4.b	Gap Analysis Report to include additional user requirements	Every Event	NLT 30 days after event date is selected
4.b	Final After Action Report to Executive Director, OSDDBU and SECVA	Annually	NLT 30 Days after NVSBE
4.b	SECVA Waiver	Bi-Annually	NLT 60 days after event site selection results
4.c	DAP Director's Presentations	Weekly	Every Tuesday
		Meetings	As directed
4.c	DAP Director's Meeting Schedules	Daily	NLT 10:00 AM and throughout the day as needed
4.c	DAP Mail Distribution	Daily	As needed
4.c	DAP Task Monitoring Report	Weekly	Every Tuesday
4.c	VA Conference Package	30,60,90 days before event 15 and 45 days after event	TBD based on event date
4.c	Site Selection comparison report with recommendations	Every Event	NLT 30 days after event date is selected
4.c	Final After Action Report to Executive Director, OSDDBU and SECVA	Annually	NLT 30 Days after NVSBE
4.c	SECVA Waiver	Bi-Annually	NLT 60 days after event site selection results

6. Government-Furnished Information, Equipment, and Facilities.

The Government will provide work space, telephone service, and GFE necessary (telephone, two monitors, a keyboard mouse, CPU, access to printing, scanning, and copying) for contractor personnel working at the Government locations.

7. General Experience Requirements:

Contractor personnel shall be fully qualified, possessing required certifications and skills sets, and have the level of experience necessary to accomplish the requirements of this PWS. In addition, contractor personnel shall be acceptable to the Government in terms of personal and professional conduct, and technical knowledge. Furthermore, contractor personnel are expected to be proficient using office automation equipment, Microsoft Office and Adobe software, and have sufficient written and verbal communication skills to support the OSDBU mission. Should any contractor personnel be determined to be unacceptable in terms of technical competency or unacceptable personal conduct while on-site or while working on contract activities, the contractor shall immediately remove and replace the unacceptable on-site personnel at no additional cost to the Government.

General Minimum Qualification: All contractor personnel shall meet the minimum education and experience requirements per VA119A-13-R-0210, Agile Delivery of VA Imminent Strategic and Operational Requirements (ADVISOR) unless otherwise stated in this PWS.

- General Clerk 1 Requirements
 - Shall have a minimum of 2 years of college and 5 years' experience.
 - Familiarity with software applications, such as those included in Microsoft Office (ie., Excel, PowerPoint, Outlook, Word and other off-line applications).
 - Knowledge and skills of oral (one-on-one and before groups) and written communication techniques pertaining to accounting data and systemic processes in relation to mission accomplishment
 - Operates personal computer and peripheral equipment, e.g., printer, scanner, fax to prepare word documents and spreadsheet calculations associated with functional responsibilities.

8. Key Personnel.

Task	Labor Category	Title	Special Qualifications/Certifications
4.a	Cost Analyst-Junior	Cost Analyst	<ul style="list-style-type: none">• Demonstrated knowledge of Federal Acquisition regulations, policies and processes• Bachelor's Degree or higher degree required• 5 years' experience required• Demonstrated knowledge of cost analysis and reporting• Knowledge of cost models, specifically.• Knowledge of cost and economic analyses principles, techniques,

Task	Labor Category	Title	Special Qualifications/Certifications
			<p>and practices.</p> <ul style="list-style-type: none"> • Ability to plan and execute complex, multi-faceted projects within established financial and time constraints • Ability to recognize and analyze problems, conduct research, summarize results, and make appropriate recommendations. • Ability to stratify resources against approved programs; to plan, present, and execute budgets; to analyze budget impacts on programs; and to forecast long-term funding requirements. • Ability to originate new ideas, projects, studies, and methodologies. • Ability to research, analyze, interpret and apply rules, regulations, and procedures. • Knowledge of goals, resources, objectives, organizations, functions, and sources pertinent to the program(s) and the organizations studied or served, and related customers, functions, resources, and users. • Ability to develop and utilize appropriate data collection techniques. • Ability to communicate orally and in writing.

Task	Labor Category	Title	Special Qualifications/Certifications
			<ul style="list-style-type: none"> • Knowledge of government acquisition and life cycle management policies, procedures, and practices. • Knowledge of PPBES. • Familiarity with software applications, such as those included in Microsoft Office (ie., Excel, PowerPoint, Outlook, Word and other off-line applications). • Knowledge and skills of oral (one-on-one and before groups) and written communication techniques pertaining to accounting data and systemic processes in relation to mission accomplishment • Operates personal computer and peripheral equipment, e.g., printer, to prepare word documents and spreadsheet calculations associated with functional responsibilities.
4.b	Data Analyst-Junior	Data Analyst	<ul style="list-style-type: none"> • Demonstrated knowledge of Federal Acquisition regulations, policies and processes • Bachelor's Degree or higher degree required • 5 years' experience required • Knowledge of analytical and evaluative methods and techniques related to the efficiency and effectiveness of program

Task	Labor Category	Title	Special Qualifications/Certifications
			<p>operations.</p> <ul style="list-style-type: none"> • Knowledge of planning and conducting projects and studies, to evaluate and recommend ways of improving business processes regarding data improvement. • Knowledge of statistical, financial, and data processing techniques and principles and a working knowledge of statistics software, graphics software, and word processing • Skill in oral and written presentations • Ability to communicate orally and in writing. • Familiarity with software applications, such as those included in Microsoft Office (i.e., Excel, PowerPoint, Outlook , Word and other off-line applications). • Knowledge and skills of oral (one-on-one and before groups) and written communication techniques pertaining to accounting data and systemic processes in relation to mission accomplishment • Operates personal computer and peripheral equipment, e.g., printer, to prepare word documents and spreadsheet calculations associated with functional responsibilities.

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9. Task Order Quality Assurance Surveillance Plan (QASP).

Deliverable or Requirement	Performance Standard	Surveillance Method	Outcome
<p>4.a</p> <ol style="list-style-type: none"> 1. VA Conference Package 2. Event Budget Reports 3. DAP Cost projection reports 4. DAP Cost execution reports 5. VA Conference Event Package 6. Final After Action Report to Executive Director, OSDDBU and SECVA 7. SECVA Waiver 8. Risk analysis assessment 9. Integrated Logistics Support Plan 10. Gap Analysis Report to include additional user requirements 	<ol style="list-style-type: none"> 1. Provide products that are clear, concise, and error free. 2. All products will be Section 508 compliant and meet VA Correspondence Guidelines. 3. Delivered in hard copy and Microsoft Word or Excel (as appropriate) electronic formats 	<ol style="list-style-type: none"> 1. All deliverables will be coordinated with the federal team lead. 2. Approved products delivered IAW Schedule of Deliverables section 11.3 or agreed upon OSDDBU due dates. 3. Revised deliverables shall be resubmitted within two (2) business days after initial review. 	<ol style="list-style-type: none"> 1. 95% of deliverables are approved by the Federal Team lead. 2. 100% of revised deliverables shall be free of errors. 3. Poor performance may result in issuance of a Contractor Discrepancy Report (CDR), as outlined in Section 7.2 of the IDIQ contract. The contractor's performance on this TO will be reported to the Contractor Performance Assessment Reporting System (CPARS) on an annual basis. The CO and COR will make use of information from CDRs, as well as any additional knowledge and information available to them with respect to the contractor's performance, to complete the CPARS. 4. The Government will not pay for services that do not conform or do not meet performance standards, or have not been properly rendered. 5. The contractor will be given an opportunity to correct non-conforming services at no cost to the Government if the services

			are non-conforming or the contract requirement is unacceptable.
<p>4.b</p> <ol style="list-style-type: none"> 1. VA Conference Package 2. DAP event statistical report 3. DAP trend reports 4. DAP metrics reports 5. Site Selection comparison report with recommendations 6. VA Conference Event Package 7. Final After Action Report to Executive Director, OSDBU and SECVA 8. SECVA Waiver 9. Risk analysis assessment 10. Integrated Logistics Support Plan 11. Gap Analysis Report to include additional user requirements 	<ol style="list-style-type: none"> 1. Provide products that are clear, concise, and error free. 2. All products will be Section 508 compliant and meet VA Correspondence Guidelines. 3. Delivered in hard copy and Microsoft Word or Excel (as appropriate) electronic formats 	<ol style="list-style-type: none"> 1. All deliverables will be coordinated with the federal team lead. 2. Approved products delivered IAW Schedule of Deliverables section 11.3 or agreed upon OSDBU due dates. 3. Revised deliverables shall be resubmitted within two (2) business days after initial review. 	<ol style="list-style-type: none"> 1. 95% of deliverables are approved by the Federal Team lead. 2. 100% of revised deliverables shall be free of errors. 3. Poor performance may result in issuance of a Contractor Discrepancy Report (CDR), as outlined in Section 7.2 of the IDIQ contract. The contractor's performance on this TO will be reported to the Contractor Performance Assessment Reporting System (CPARS) on an annual basis. The CO and COR will make use of information from CDRs, as well as any additional knowledge and information available to them with respect to the contractor's performance, to complete the CPARS. 4. The Government will not pay for services that do not conform or do not meet performance standards, or have not been properly rendered. 5. The contractor will be given an opportunity to correct non-conforming services at no cost to the Government if the services are non-conforming or the

			contract requirement is unacceptable.
<p>4.c</p> <ol style="list-style-type: none"> 1. DAP Director's Calendar 2. DAP Director's Presentations 3. DAP Director's Meeting Schedules 4. DAP Mail Distribution 5. DAP Task Monitoring Report 6. Site Selection comparison report with recommendations 7. VA Conference Event Package 8. Final After Action Report to Executive Director, OSDDBU and SECVA 9. SECVA Waiver 	<ol style="list-style-type: none"> 1. Provide administrative support to the Direct Access Team. 2. Develop activity reports documenting deliverable status. 3. Schedule required meetings and conferences/calls. 4. Solicit input and post daily calendar updates for Director and Deputy Director. 	<ol style="list-style-type: none"> 1. Provide products that are clear, concise, and error free. 2. All products will be Section 508 compliant and meet VA Correspondence Guidelines. 3. Delivered in hard copy and Microsoft Word electronic formats. 	<ol style="list-style-type: none"> 1. 95% of deliverables are approved by the Federal Team lead. 2. 100% of revised deliverables shall be free of errors. 3. Poor performance may result in issuance of a Contractor Discrepancy Report (CDR), as outlined in Section 7.2 of the IDIQ contract. The contractor's performance on this TO will be reported to the Contractor Performance Assessment Reporting System (CPARS) on an annual basis. The CO and COR will make use of information from CDRs, as well as any additional knowledge and information available to them with respect to the contractor's performance, to complete the CPARS. 4. The Government will not pay for services that do not conform or do not meet performance standards, or have not been properly rendered. 5. The contractor will be given an opportunity to correct non-conforming services at no cost to the Government if the services are non-conforming or the

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